

Trends Report

This report provides an overview of the key trends affecting food and beverage choices in travel locations and what this means for F&B operations



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Trends and why they matter for travel F&B

Ours is a complex world. The appetite for travel continues to grow and the needs of travellers are evolving. It's therefore essential that we have a detailed understanding of what the changes are that influence that evolution if we are to provide our customers with what they want, at the time they want it, and in the place they want it.

At SSP, we have categorised these changes into three tiers. Firstly, there are the macro shifts in the way people think and behave across the world that impact us all. Then there are what we call 'megatrends' that prompt changes in what consumers demand from the businesses they engage with, and how they want to interact with those organisations. Thirdly, there are trends that are specific to the travel environment that impact how consumers travel and what they want from their travel experience.

In the food travel retail arena, it's vital that we understand these trends, draw intelligent conclusions about their impacts, and then act on these to ensure that our offer is perfectly dovetailed to the needs of our customers.



Global Trends

Developments that change our world

These are the long-term social, cultural, economic, political and environmental evolutions that take place over decades rather than years and prompt fundamental changes in the way the world operates. They include major changes in population densities across geographies, shifts in political behaviour such as the polarisation of political attitudes, long-standing inequalities blooming into geo-political crises, or the development of life-altering technologies.



So what?

Understanding these tectonic movements enables us to scope out how our business needs to develop in the future and where and how we should be investing.

Geopolitical trends

These shape the global order, affecting trade, diplomacy and security. They include the rise of new powers, shifts in alliances and the management of global challenges.

Demographic trends

These include shifts such as an aging population, changing family constructs and social values, increased gender equality and urbanisation. They shape labour markets, healthcare systems and cultural norms. Understanding these trends helps anticipate changes in consumer behaviour, workforce dynamics and social expectations.

Environmental trends

This driver relates to sustainability, climate change, resource management and biodiversity. It affects future trends by influencing regulations, consumer preferences and corporate strategies. Environmental concerns spur innovations in clean energy, conservation efforts and sustainable practices across industries.

Example

February 2024 was the warmest February on record globally, with an average surface air temperature of 13.54°C, 0.81°C above the 1991-2020 average for February and 0.12°C above the temperature of the previous warmest February, in 2016. This is the ninth month in a row that was the warmest on record for the respective month of the year. February was 1.77°C warmer than an estimate of the month average for 1850-1900, the designated pre-industrial reference period.^[1]

[1] Copernicus Climate Change Service bulletin - <https://climate.copernicus.eu/copernicus-february-2024-was-globally-warmest-record-global-sea-surface-temperatures-record-high#:~:text=The%20global%20average%20temperature%20for,%201900%20pre%20industrial%20average>

Mega Trends

The shifts that are shaping the future of the consumer landscape

These are trends that are evolving more quickly and point to future opportunities for development. These include:

- The desire for new experiences
- The acceleration of digital technologies
- A greater focus on wellbeing
- The need for value
- The ever-increasing importance of sustainability



So what?

It's essential to understand how these trends are forming the future consumer landscape and use them to shape plans for the medium term of between 18 months to five years.

The desire for new experiences

As traditional points of connection are eroded, consumers – particularly Millennials and Gen Z – are looking for opportunities to reconnect with the world around them. In an increasingly uncertain climate, consumers are seeking the distraction of memorable experiences that engage multiple senses.

Connection

Consumers are looking to reconnect with each other as traditional points of personal interaction are replaced with technology



Experience economy

Consumers want to spend on memorable experiences that go beyond a simple transaction of goods or services



Multi-sensory experiences

Consumers are looking for products and brands to enhance their experiences by engaging multiple senses



From internal data, 2024

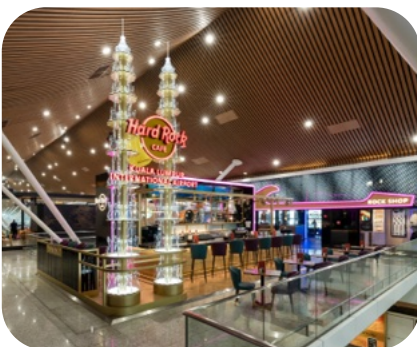
So what?

Before the pandemic, the focus of travel industry food and beverage operations tended to be price and time, and until now, high-street brands that combine hospitality with a sporting or leisure activity such as darts or cricket have not been widely seen in the travel space. Now, providing activities or environments that capture the imagination needs to be considered alongside offering food and drink. Experiences happen twice – once in real time, and once later in the digital world.

At BrewDog at London Gatwick, customers can enjoy video games inside the bar.



BrewDog, London Gatwick Airport



Hard Rock Cafe, KLIA

The Hard Rock Cafe at KLIA features a highly 'Instagrammable' replica of Kuala Lumpur's iconic Petronas Towers made out of glass guitars.

Sky Gamerz restaurant, now open in Seattle Airport, is equipped with HD screens allowing passengers to engage in both single and multiplayer video games during their visit.



Sky Gamerz, SEA Airport



The Independent, Brisbane Airport

The Independent at Brisbane Airport features a rotating line-up of acclaimed chefs kicking off with Luke Mangan, who runs a number of highly-regarded restaurants across Australia. Menus at this imaginative new outlet incorporate ingredients from independent suppliers.

SSP's new Tigerstaden bar at Oslo Airport will feature an 'Instagrammable' giant tiger sculpture carved from sandstone. At night, the statue will be illuminated with projection mapping technology that will bring the creature to life in vivid digital colour.



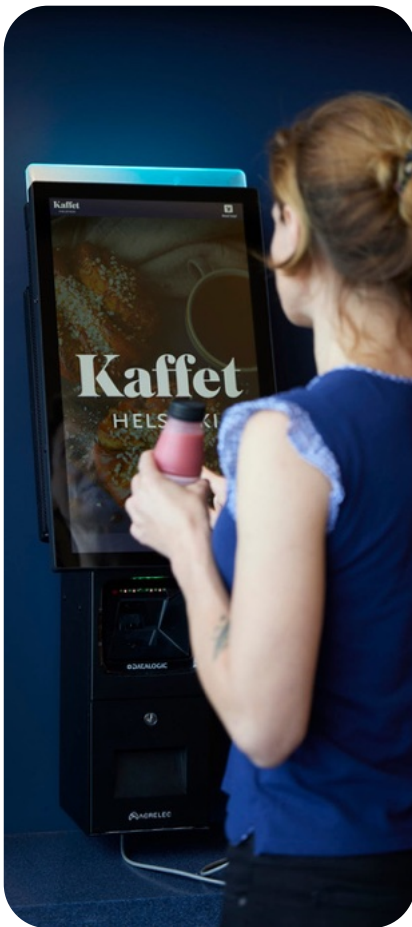
Tigerstaden, Oslo Airport



Shelby & Co, Birmingham Airport

Shelby & Co at Birmingham International Airport was developed in partnership with Steven Knight, the creator of Peaky Blinders. It mirrors the era in which the globally popular TV programme is set, evoking the 1920s across its design.

The acceleration of digital technologies



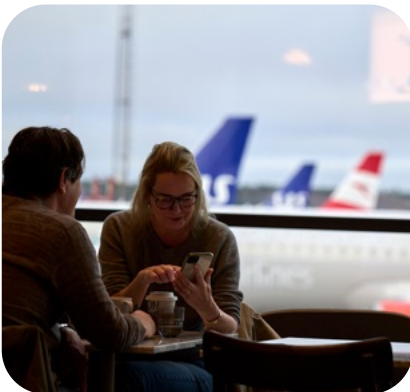
The demand from consumers for products and services that speed up and simplify their experiences is increasing. At the same time, consumers are seeking reassurance from brands on how changes will work alongside human interaction in the future.

Levels of acceptance and desire to use digital tools will vary considerably – with certain age ranges and geographic markets being more keen to adopt new technologies.

So what?

Technology only serves a purpose if it works efficiently and effectively – tech that is absent or is subpar irritates rather than enhances the experience. We need to understand the role of AI as we analyse data, and what the role of our colleagues is in delivering outstanding hospitality in a digital age. Technology must augment traditional hospitality, not replace it.

SSP uses digital technology to enhance the customer experience. SSP displays estimated waiting times in several units across Europe and the UK. This allows travellers to take control of their journey as they can plan and assess the time needed before going to their gate.



Order@table, now available at many SSP bars and restaurants, allows customers to order and pay quickly and easily via their own personal digital device. Guests simply open a tab and order at their leisure, scanning and paying when they are ready to leave.

Service robots are being trialled in the UK, Nordics and Germany. These are used to collect trays when customers have finished their meal, providing a better, speedier service as well as adding entertainment value and 'Instagrammable moments' to the passenger experience.



Self-ordering kiosks can help to decrease wait times in an environment where customers are often anxious about how long they have before they need to head to the gate. They enable travellers to choose their food, send their order to the kitchen, and pay, all in a few taps.

A greater focus on wellbeing



Consumers increasingly take a holistic approach to health, seeking products that support them mentally and physically. They want to make healthier food choices, reducing the amount of sugar, calories, salt and alcohol in their diets while allowing for indulgence. As nutritional awareness increases, consumers will also look for products that address specific concerns.

So what?

We need to ensure we offer the right mix of products to our customers, including low-fat or low-sugar options, but also items with functional benefits, including plant-based items. In addition to menus that allow customers to choose healthy options, we also need to consider how we communicate what these offers can bring to the health-conscious consumer most effectively and in an unambiguous, evidence-based manner.

Example

SSP's Better Choice initiative uses simple iconography to help customers identify healthier menu options. It highlights fruits, vegetables, whole grains and protein foods including seafood, lean meats and nuts, as well as food choices with lower added sugars, sodium or saturated fats. SSP partners with a number of health-focused brands to help customers make healthy and informed choices about the foods they eat. Belgian-based restaurant concept EXKi, which SSP operates in France and Italy, is famed for its ethos of serving nothing but wholesome products.

The need for value

Value matters. More than 70% of consumers still worry about inflation and job loss^[2], and most consumers have continued to adjust their purchasing habits in response to high prices. Even though people who travel by air tend to be more affluent than the rest of society, they're still looking for good value for money when purchasing food and drink in a travel setting.

So what?

Because travel is a priority, people are still travelling, but we are seeing an increase in price sensitivity. We need to make sure we have offers at a range of price points to ensure that all consumers can find something appropriate, whatever their budget. Meal deals that offer additional value are welcomed.

Example

SSP constantly evolves its brand portfolio to ensure there is a mix of value and premium brands to respond to the needs of different customers. For example, in rail stations across Germany, SSP operates a number of Backwerk units, a brand that offers low-cost options.

At SSP, menus are optimised to include premiumised items and add-ons along with more affordable options. SSP's 'good, better, best' approach means there is always an exciting, tasty option to suit everyone.

[2] Edelman Trust Barometer, 2024



The importance of sustainability

People are becoming increasingly conscious of how their choices and purchases impact the environment, people and their local and global communities. As a result, many are actively seeking to reduce their environmental footprint by choosing brands and products that align with their values.

So what?

Taking a responsible stance has moved from a nice-to-have to an essential for any brand that wants to attract and retain the engagement of consumers.

Examples

SSP has a science-based target to achieve net-zero GHG emissions by 2040, from our 2019 base year, and is collaborating with suppliers, clients and brand partners to drive emission reductions.

SSP has partnered with Klimato, a digital platform to calculate, monitor and communicate the climate impact of our own-brand recipes in the UK and the UAE.

Current Travel Trends

These trends are supported by the expectation for global travel to stay resilient, presenting strong opportunities for the travel F&B sector.

Global travel continues to grow

Globally, travel continues to increase and remains a priority for customers. There was significant growth in passenger numbers in 2024, with global air passenger traffic reaching 2019 levels or beyond in most regions, notably +11% in the Middle East and +4.2% in North America.^[3]

[3] ACI – September 2024

Travel behaviours are changing

Simultaneously, we're witnessing changes in travel behaviours, which can influence the way we're planning for holiday seasons and how we build our customer offer based on travellers' profiles. First, we've seen a reweighting towards leisure travel, with business travel recovering at a slower pace. This is coupled with the emergence of 'bleisure' travel, consisting in extending a business trip into a holiday or remote working. As more workers are now able to work flexibly, leisure trips can be extended into remote working days, enabling them to extend their holiday stay. And we are seeing a notable increase in longer stays, with travellers extending their trips by an extra day in 2024 compared with 2019.^[4]

In parallel, traditional holiday times and destinations are evolving, with the notion of shoulder seasons becoming more important. Travellers are increasingly choosing to travel just before or after the summer (May-June and September-October) and to new destinations to avoid peak summer crowds and high costs. This is supported by a change in demographics, with the emergence of solo travellers and the growing number of retirees traveling without children. That in turn can lead to the need for different ranges and offers for customers who are travelling outside of traditional holiday time.

[4] 'Travel Trends 2024 - Breaking Boundaries', Mastercard Economics Institute, <https://www.mastercardservices.com/en/industries/travel/insights/travel-trends-2024-breaking-boundaries>

We are the food travel experts – and that expertise must be underpinned by a profound understanding of how the travelling consumer thinks and behaves. To deliver fantastic experiences wherever we operate, we stay close to our customers’ evolving demands and what needs to be done to help our clients meet those needs.

“In the fast-changing post-covid world, the pace at which trends have emerged has accelerated at an unprecedented rate, meaning keeping abreast of change and reacting to it quickly is an even more demanding process. Across our business, we run a spectrum of some of the most comprehensive studies within our industry to identify and track emerging trends as well as map the regional differences in these shifts.

“And of course, how we use knowledge we have gathered is crucial. Here at SSP, it’s the foundation of our planning, and we use it to create innovative brands, on-trend menus, and inspiring environments that delight passengers today, and will continue to delight them in the future. This is how we achieve our aim of being the best part of the journey.”



Jeremy Fennell

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